

ABOUT THE RESEARCH

The objective of this research is to map the situation in the field of research, development and innovation in industrial organisations in the Czech Republic ("CR"). The overview presented provides information on the manner that research, development and innovation take place in industrial organisations in the Czech Republic.

The information contained in this leaflet is based on comprehensive research conducted by the independent Institute for Evaluations and Social Analyses (INESAN). The data was collected across organisations residing in the Czech Republic in November 2014.

The respondents (industrial organisation representatives) were selected using the random stratified method and the data collection used the computer-aided telephone interview (CATI) method. A total of 204 valid interviews took place, with the response rate being 16%.



Good morning, I am your guide to this leaflet, and I will use these grey boxes to highlight important findings about research, development and innovation in industrial companies in the ČR.

STRUCTURE OF THE REVIEWED SAMPLE

Structure by segment: 27% of companies in the mechanical or electronic engineering industry; 22% of companies in the metallurgic or glass industry; 20% of industrial organisations in the chemical industry; 11% of organisations in the paper, wood processing and textiles industry; 21% of companies in other industrial sectors.

Structure by size of organisation: 16% of organisations have fewer than 50 employees; 42% of organisations have 50 to 249 employees; 43% of organisations have 250 or more employees.

Structure by type of ownership: 64% of organisations have a Czech ownership structure; 11% of organisations have international owners too; 25% of organisations have exclusively international owners.

Structure by turnover in 2013: 47% of organisations posted a turnover of up to CZK 249.9 million; 18% of organisations posted a turnover of CZK 250–999.9 million and 35% of organisations posted a turnover of CZK 1,000 million or more.

RESEARCH RESULTS



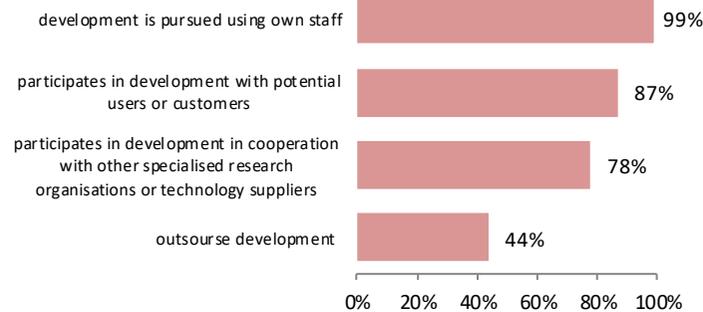
A total of 82% of the reviewed organisations have a dedicated department/staff involved in research, development or innovation.

A total of 99% organisations that have at least one dedicated research and development worker pursue research and development using their own staff.

More than eight out of 10 of those organisations pursue research in cooperation with potential users / customers, specialised research organisations or technology suppliers.

78% of businesses pursue development along with other specialised research facilities or technology suppliers. Approximately four out of 10 organisations outsource research and development.

Graph 1: Research and development methods



Note: the figures apply only to the organisations with a dedicated department / worker involved in research, development or innovation (82%)



95% of the interviewed organisations plan on research and development in the upcoming two to three years

A comparison of the current and planned research and development allows the conclusion that there has been an increase in all four methods of pursuing research and development (research and development using in-house personnel, research and development in cooperation with potential users/customers, research and development in cooperation with specialised research organisations or technology suppliers and outsourced research and development).

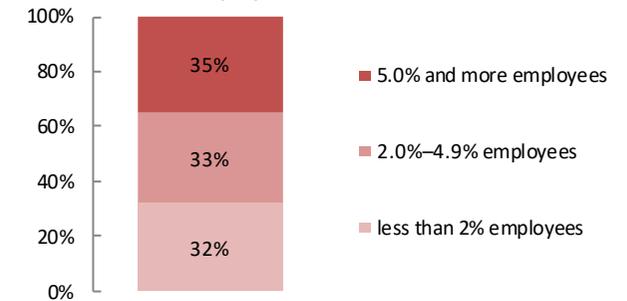
RESEARCH RESULTS



In terms of human resources in research and development, it was established that industrial organisations pursuing research and development have on average 12 research or development employees.

The percentage of research and development jobs is lower than 2% of the total number of employees in 32% of the organisations, it ranges from 2.0% to 4.9% in one-third of the organisations and it is 5% or more in 35% of the organisations.

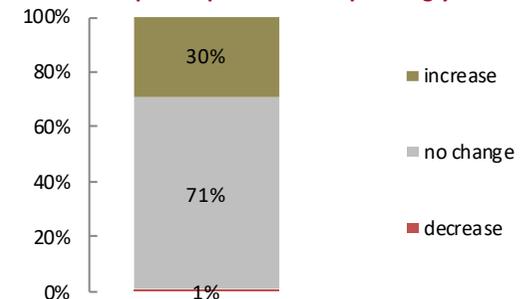
Graph 2: Percentage of research and development jobs in the total number of employees



Note: the figures apply only to organisations with a dedicated department / worker involved in research, development or innovation (82%)

The increase in the utilisation of the individual methods of pursuing research and development corresponds to the estimate of the change in the number of in-house research and development staff. A total of 30% of the organisations say they intend to increase the number of such personnel, 70% say the number of their personnel will not change and 1% of the organisations expect the number of their research and development personnel to decrease.

Graph 3: Estimate of change in the number of in-house research and development personnel in upcoming years

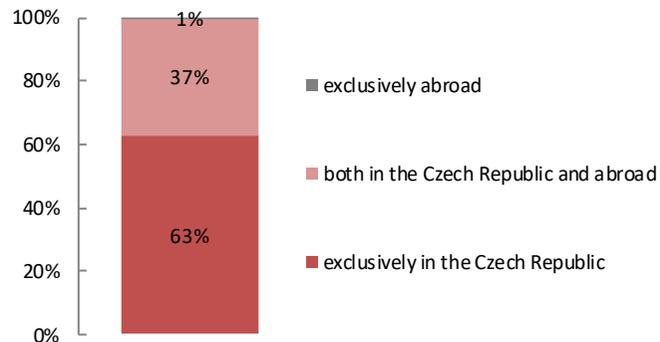


Note: the figures apply only to organisations with a dedicated department / worker involved in research, development or innovation (82%)

RESEARCH RESULTS

Research and development will take place exclusively in the Czech Republic over the next two to three years. Two-thirds of organisations say so. 37% of organisations say they will pursue research and development both in the Czech Republic and abroad. Just 1% of organisations will pursue research and development exclusively abroad.

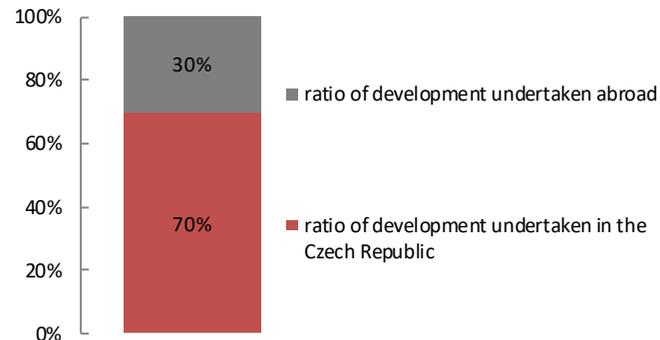
Graph 4: Location of research and development in upcoming years



Note: the figures apply only to organisations that plan to do research and development in the Czech Republic over the next few years (98 %)

With organisations planning research and development both in the Czech Republic and abroad, the ratio of research in the CR is 70%, leaving 30% of combined research and development to be undertaken abroad.

Graph 5: Ratio of combined research and development in the CR and abroad



Note: the figures apply only to organisations that plan to do research and development in the Czech Republic and abroad over the next few years (37 %)



SUMMARY:

Most industrial companies in the Czech Republic use research and development provided by in-house personnel. Combined research and development

where in-house personnel work with users/customers or with specialised research facilities/technology suppliers is also used extensively. Outsourced research and development is used to the lowest extent. An increase in the use of the individual forms of research and development is planned for the years to come; one third of organisations plan on increasing the number of their research and development workers. Approximately three-fifths of industrial companies will pursue research and development in the Czech Republic only. Approximately one-third of organisations will pursue research and development both in the CR and abroad.

ABOUT THE INSTITUTE

The Institute for Evaluations and Social Analyses is the first research institute in the field of social sciences founded in the Czech Republic. It is an independent entity formed under the rules defined by the European Union (Article 1.3 (ee) of the Framework for State aid for research and development and innovation). The Institute is a research organisation under Act No. 130/2002 on the Support of Research and Development from Public Funds and is registered in the List of Research Organisations of the Research, Development and Innovation Council ("RVVI"). The objective of the Institute is to conduct fundamental research, applied research or experimental development and disseminate the results through teaching, publishing or technology transfer, with any and all profit reinvested in the above activities.

The core activities of INESAN are evaluations and social analyses. The topics that INESAN focuses on include ethical behaviour, managerial studies, ICT, environment and social topics. Thanks to its background in the methodology of applied social research, INESAN also processes surveys and methodological analyses. INESAN also provides expert services in creating methodological tools for evaluation, undertakes evaluations, participates in the preparation of tender documents, provides peer reviews of the individual documents related to evaluation and social research methodology. The publications, expert reports and opinions issued by INESAN are not biased by the attitudes of donors and clients; they present the independent views of INESAN experts.



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BRIEF INFORMATION ON RESEARCH RESULTS 2014